



Department of Defense
INSTRUCTION
AD-A274 491

October 15, 1993
NUMBER 1215.7

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SUBJECT: Service Credit for Reserve Retirement

ASD(RA)

- References:**
- (a) DoD Instruction 1215.7, "Reserve Retirement Point Credit," December 19, 1974 (hereby canceled)
 - (b) DoD Directive 1205.17, "Official National Guard and Reserve Component Personnel Data," June 20, 1985
 - (c) Title 10, United States Code
 - (d) DoD Directive 1215.6, "Uniform Reserve, Training and Retirement Categories," December 18, 1990
 - (e) through (h), see enclosure 1

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A. REISSUANCE AND PURPOSE

This Instruction reissues reference (a) to update existing responsibilities and procedures and to establish uniform policy and procedures, consistent with the requirements of reference (b), for the crediting of Active and Reserve service for non-Regular retirement under Chapter 67 of reference (c).

B. APPLICABILITY

This Instruction applies to the Office of the Secretary of the Defense (OSD) and the Military Departments, including the Coast Guard by agreement with the Department of Transportation when it is not operating as a Service in the Department of the Navy. The term "Military Services," as used herein, refers to the Army, the Navy, the Air Force, the Marine Corps, and the Coast Guard, including their National Guard and Reserve components. "Secretary concerned" refers to the Secretaries of the Military Departments and the Secretary of Transportation for the Coast Guard when it is not operating as a Service in the Department of the Navy.

C. DEFINITIONS

1. **Equivalent Instruction.** Those activities performed instead of or in addition to a regularly scheduled unit training assembly or drill. The subject matter of the equivalent instruction shall relate to the instruction for which it is or might be substituted, and shall be of definite military benefit to the individual.

2. **Uniformed Services.** These are the Army, the Navy, the Air Force, the Marine Corps, the Coast Guard, the Commissioned Corps of the U.S. Public Health Service, and the Commissioned Corps of the National Oceanic and Atmospheric Administration.

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D. POLICY

It is DoD policy that uniform procedures shall be used by all Military Services to manage the crediting and accounting of all Regular and Reserve service of service members that is creditable for non-Regular retirement.

E. RESPONSIBILITIES

1. The Assistant Secretary of Defense (Reserve Affairs) shall establish:

a. Uniform Reserve components' training and retirement categories prescribed in DoD Directive 1215.6 (reference (d)).

b. Personnel transaction accounting, personnel data definitions, and data accuracy standards to support the policy established in DoD Directive 1205.17 (reference (b)).

2. The Assistant Secretary of Defense (Personnel and Readiness) shall:

a. Ensure that personnel data requirements for actuarial valuations of non-Regular retirement are identified to the Assistant Secretary of Defense (Reserve Affairs).

b. Issue such policy guidance to, and exercise management supervision of, the Defense Manpower Data Center (DMDC), consistent with responsibilities identified in DoD Directive 5124.2 (reference (e)), to ensure that DMDC is able to fulfill its responsibilities to support the Military Services' maintenance of uniform and accurate procedures for crediting service for non-Regular retirement.

c. Ensure that the Director, DMDC, shall administer the collection, processing, and reporting of personnel data in support of the OSD and the Military Services consistent with the responsibilities of the Director, DMDC, in DoD Instruction 7730.54 (reference (f)).

3. The Secretaries Concerned shall ensure the capability exists to operate and maintain Reserve personnel data systems consistent with Active component personnel data systems so that these systems are compatible and may be efficiently integrated on mobilization of Reserve forces. These systems shall provide the capability to record and maintain the information necessary for the accurate, effective, and timely management of Service credit for non-Regular retirement in accordance with DoD Directive 1205.17 (reference (b)) and this Instruction. This shall, as a minimum, include the capability to:

a. Obtain and maintain for all members the information necessary to accurately credit Uniformed Service for non-Regular retirement. This shall include the service date information specified in this Instruction and the active duty, inactive duty, and other duty or service for which retirement points may be credited. In addition, information necessary to ensure timely and accurate issuance of the notice of fulfillment of the service requirements for eligibility for non-Regular retired pay required by Section 1331(d) of 10 U.S.C. (reference (c)) shall be obtained and maintained.

b. Provide for the automated transfer of complete service data and service credit information between the components of their respective Services and, as required, to any other Service in the case of the inter-Service transfer of a member.

c. Provide the data required by the Chief, Office of the Actuary, Department of Defense, for the valuation of the costs of non-Regular retirement and the computation of the normal cost contribution to be assessed against the basic pay and the basic pay element of compensation for inactive duty training for members paid from National Guard or Reserve personnel appropriations who are not on active duty (other than for training) or full time National Guard duty (other than for training).

d. Ensure that the information required is available so that retired pay for non-Regular retirement can be accurately calculated in a timely manner on application by eligible individuals at or after age 60.

F. PROCEDURES

1. Criteria for Establishing the Service Requirement for a Satisfactory Year of Service for Non-Regular Retirement.

a. Qualifying Years of Satisfactory Service. A qualifying year of service for non-Regular retired pay is a full year, as described in paragraphs F.1.b. and F.1.c. below, during which a Regular or Reserve member is credited with a minimum of 50 retirement points. Except as otherwise provided by law, an accumulation of 20 such years is one requirement necessary to qualify for non-Regular retired pay.

b. Establishment of an Anniversary Year.

(1) The full-year periods used for the crediting of qualifying years for non-Regular retirement shall be based on "anniversary" years as set out in this Instruction.

(2) Except as noted in paragraph F.1.d. below, these anniversary year periods are calculated from an anniversary date.

The date used to determine the anniversary year is established by the date the member entered into active service or into active status in a Reserve component.

c. Adjustment to Anniversary Years.

(1) The start date (month and day) for each successive anniversary year will not be adjusted unless the member has a break-in-service. A break-in-service occurs only when a member transfers to an inactive status list, the Inactive National Guard, a temporary disability retired list, the Retired Reserve, or is discharged to civilian life for a period greater than 24 hours. There will be no break-in-service if the member transfers directly to another Regular or Reserve component.

(2) When a member with a break-in-service returns to an active Reserve status or to active service, the revised anniversary year start date shall be the date of return or reentry.

d. Exceptions to Calculating Anniversary Years.

(1) In the case of officers with Reserve service as a cadet or midshipman at a Service Academy or in a the Reserve Officers' Training Corps program, the date for the start of a member's initial anniversary year will be established as the date the member entered into active service or active status minus any service as a cadet or midshipman.

(2) In the case of enlisted members of the Armed Forces (members who have service as a cadet or midshipman but who did not later receive or who do not hold a commission as an officer), service as a cadet or midshipman at a service academy shall be included and counted as active duty.

e. Credit for Partial Years of Service.

(1) A member who has a break-in-service that occurs during an anniversary year shall be credited with a partial year of qualifying service for non-Regular retirement.

(2) When, as a result of a break-in-service, a partial year occurs, the service member must meet the minimum retirement point requirements set out in this Instruction for the member's service to be credited as a partial year towards a qualifying year. A partial qualifying year is any period less than 12 full months in which the retirement points credited to a member, when computed proportionally to 12 months, are equal to or greater than 50 points. Calculation of credit for a partial year shall be made according to the schedule at enclosure 2.

(3) Partial years of qualifying service may be combined and credited towards total qualifying service.

(4) Membership points for any partial year shall be credited based upon the table at enclosure 3. On completion of a partial year, inactive duty points, which include prorated membership points, creditable for non-regular retired pay purposes shall be credited. Inactive duty points credited in a partial year may not exceed 60 points.

f. Savings and Transition Procedures. On the effective date of this Instruction, all present members of a Reserve component shall retain their current anniversary date. Except as indicated elsewhere in this Instruction, anniversary dates established or revised after the effective date of this Instruction, including anniversary dates for members of a Regular component on the effective date of this Instruction, shall be based on procedures established in this Instruction.

2. Reserve Service Requirements to Qualify for Non-Regular Retirement. To qualify, on application, for non-Regular retired pay, at or after age 60, a member must have, unless otherwise provided by law, completed 20 years of qualifying service. The last 8 years of such qualifying service must be in a Reserve component. As provided in the C.G. File B-111903 (reference (g)), there is no requirement that the last 8 years of qualifying Reserve component service be continuous. Any period of service as a member of a Regular component intervening between periods of Reserve service counted toward the 8-year requirement must be excluded in determining whether the member has the requisite 20 years of qualifying service for eligibility for non-Regular retired pay. Service in a Regular component during a partial year shall be treated in the same manner as 1 full year of service in this respect.

3. Eligibility for Retirement Point Credit for Non-Regular Retirement. Members in the following categories are eligible for retirement point credit:

a. Members of a Regular or Reserve component in active service.

b. Members of a Reserve component in an active status as defined in Section 268 of (reference (c)). (This includes service in a Delayed Entry Program established by Section 513 of reference (c). This service is credited toward non-Regular retirement since it is service in an active status as a member of the Ready Reserve.

c. Members of a Reserve component in a retired status (other than members who have retired from active service, or members transferred to the Retired Reserve under Section 1001(b)

of reference (c)) who are ordered to perform active duty or other appropriate duty in a retired status may be credited with active or inactive duty service pursuant to such order.

d. Members of a Reserve component in an inactive status who are carried on an inactive status list of the Reserve component concerned under section 273 of reference (c) may not be credited with service for retirement per section 1334(a) of reference (c). (Individuals who have completed the service requirement for retired pay but are not yet age 60 may be transferred to an inactive status, but may not receive retirement point credit in that status.)

4. Retirement Point Credit by Activity.

a. Active Service. Active service shall be credited at the rate of one point per day of active service. Active service is service on active duty or full-time National Guard duty.

b. Inactive Duty Service. Inactive duty service shall be credited as follows:

(1) One point for each attendance at an inactive duty training (IDT) period or a period of equivalent instruction that was prescribed for that year by the Secretary concerned and conformed to the requirements prescribed by law, including attendance by a member of the National Guard at required IDT periods under section 502 of reference (c).

(2) A maximum of two retirement points may be credited for attendance at unit training assemblies or IDT periods in any one calendar day.

(3) Reservists in an active status may be credited with retirement points at the rate of one point per 3 hours of nonresident instruction successfully completed.

(4) One retirement point shall be credited to Reservists in an active status for each period of equivalent instruction in accordance with the following standards:

(a) If the instruction is performed instead of regularly scheduled unit training assembly or IDT period, it shall be of at least the same duration as required for the assembly or IDT period it replaces.

(b) If the instruction is performed as a part of a regularly scheduled unit training assembly or IDT period, only one retirement point may be credited for that period.

(c) If the instruction performed is in addition to the regularly scheduled unit training assembly or IDT period, the instruction

shall be of at least 4 hours duration and shall be performed in a nonpay status (unless a specific activity is authorized for pay by the Secretary concerned).

(d) When multiple periods of equivalent instruction are performed, each period must be of 4 hours duration, whether performed instead of or in addition to a regularly scheduled unit training assembly or IDT period.

(e) The equivalent instruction shall be authorized and supervised by the unit commander or the commander's representative, and certification of the type and duration of the instruction shall be forwarded to the Secretary of the Military Department concerned or the Secretary's designee for that purpose.

(5) The Military Services may sponsor military seminars, symposia, and similar assemblies (hereafter referred to as "meetings"), either separately or in connection with professional meetings, as a means of conducting Reserve instruction. Participation will be in accordance with DoD Directive 5500.2 (reference (h)). Retirement points may be granted to Ready Reservists attending such a meeting only when:

(a) The meeting is designated by the Military Service concerned as being of such military value that the instruction received would enhance the Reservist's professional development and broaden either:

1 The Reservist's qualifications for duties to which the Reservist may be expected to be assigned upon mobilization, or

2 The qualifications of those whose work the Reservist may supervise.

(b) The meeting is of at least 4 hours duration. A maximum of one retirement point per day of the meeting shall be credited.

(c) The Reservist's attendance has been approved previously and, in each instance, by the Secretary of the Military Department concerned or the Secretary's designee for that purpose.

(d) The Reservist either registers with a designated monitor representing the Military Service concerned or, in the absence of such a monitor, is authorized to and does certify his or her own attendance.

(e) The Reservist's participation is without remuneration other than the pay to which the Reservist may be entitled as a member of a Reserve component.

(6) Individual Ready Reservists and active status Standby Reservists may participate in civil defense activities as outlined in enclosure 3 of DoD Directive 1215.6 (reference (d)), and may be credited with retirement points as follows:

(a) A period of IDT of a duration to be determined by the Federal Emergency Management Agency, but not less than 4 hours.

(b) Training shall consist of civil defense work at a duly scheduled work formation in an officially designated location under active supervision.

(c) Wearing of the uniform shall be optional with the individual. (This does not constitute a basis for a claim for uniform maintenance allowance.)

(d) A maximum of two points for IDT may be credited per day (a day will be considered the equivalent of a multiple drill; i.e., 4 hours minimum).

(e) In no case shall more than one point be credited for any period of less than 8 hours.

(f) Each volunteer Reservist shall furnish his or her respective (county, city, state, region) Civil Defense Director a certification form, which shall be signed by the Civil Defense Director attesting to the individual's satisfactory work performance and hours worked. This form shall be submitted each month or quarter in accordance with appropriate Military Department regulations.

(7) Members of a Reserve component in an active status shall be credited with points for such membership the rate of 15 points per year or a proportional part thereof.

(8) Retirement points credited for activities other than active service may not exceed 60 points per year of qualifying service. A maximum of two retirement points may be awarded in 1 calendar day for any activity or combination of activities and no more than one point for any day in which the member is in active service. A person in active service may not receive retirement points for other activities concurrently, however no deduction in the membership points described in clause (7) above is required for active service, other than service as a member of a Regular component, during an anniversary year. A maximum of 365 points (366 points in a leap year) may be awarded in any anniversary year.

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G. EFFECTIVE DATE AND IMPLEMENTATION

This Instruction is effective immediately, except for paragraphs E.3.b. and F.1.c. when implementation is effective by October 1, 1995. Forward two copies of implementing documents for the rest of this Instruction to the Assistant Secretary of Defense (Reserve Affairs) within 120 days.



Deborah R. Lee
Assistant Secretary of Defense
(Reserve Affairs)

Enclosures - 3

1. References
2. Minimum Retirement Point Credit Chart
3. Pro-rating Reserve Membership Points

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References, continued

- (e) DoD Directive 5124.2, "Assistant Secretary of Defense (Force Management and Personnel)," January 26, 1990
- (f) DoD Instruction 7730.54, "Reserve Components Common Personnel Data System (RCCPDS)," March 15, 1991
- (g) Decisions of the Comptroller General, File -111930, November 6, 1952
- (h) DoD Directive 5500.2, "Policies Governing Participation of Department of Defense Components and Personnel in Activities of Private Associations," August 4, 1972

MINIMUM RETIREMENT POINT CREDIT CHART

Number of days in an active status		Minimum points required
From	Through	
0	8	1
9	14	2
15	21	3
22	29	4
30	36	5
37	43	6
44	51	7
52	58	8
59	65	9
66	73	10
74	80	11
81	87	12
88	94	13
95	102	14
103	109	15
110	116	16
117	124	17
125	131	18
132	138	19
139	146	20
147	153	21
154	160	22
161	168	23
169	175	24
176	182	25
183	189	26
190	197	27
198	204	28
205	211	29
212	219	30
220	226	31
227	233	32
234	240	33
241	248	34
249	255	35
256	262	36
263	270	37
271	277	38
278	284	39
285	292	40
293	299	41
300	306	42
307	313	43
314	321	44
322	328	45
329	335	46
336	343	47
344	350	48
351	357	49
358	365	50

PRO-RATING RESERVE MEMBERSHIP (GRATUITOUS POINTS)

NUMBER OF DAYS IN THE ACTIVE RESERVE

MEMBERSHIP POINTS TO BE CREDITED

<u>FROM</u>	<u>TO</u>	<u>POINTS</u>
1	12	0
13	36	1
37	60	2
61	85	3
86	109	4
110	133	5
134	158	6
159	182	7
183	206	8
207	231	9
232	255	10
256	279	11
280	304	12
305	328	13
329	352	14
353	365 (366 leap year)	15